ABSTRACT OF THE DISCLOSURE

A user selects (a) a classification system involving different asset classes, (b) the asset classes in which investments are to be made in the classification system and (c) a limit to the investments in each asset class. The user also selects the mode (e.g., mail, e-mail, facsimile) in which the user is to be periodically notified of the user's investments, and the investment value in each asset class. The user is notified when the assets in a class exceed the established limit. The user may (a) do nothing, (b) change the limit in the asset class or (c) change the asset classes. The user may change the notification mode, and the notification periodicity, when the investment in an asset class increases above the established limit or when the excess above the limit continues to exist. The user may be a user, an agent for a user or an agent for a group of users.

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